

FOR IMMEDIATE RELEASE

**Industry Experts Join Forces to Address Under-Representation
of Women in Financial Advising Industry**

Industry Leaders Join Nonprofit Advisory Board

[St. Petersburg, FL, April 17, 2024] A core question that drives the Women's Leadership Alliance, a nonprofit 501(c)3 with the mission to attract and advance more women in the financial advising profession:

Why has the industry not experienced notable movement in the number of women entering and remaining in the financial advising profession over the past two decades, despite increases in female representation in other traditionally male-dominated professions like law, medicine, engineering, and technology?

Many firms and financial advising leaders agree that this is a problem for the wealth management industry. With the significant wealth transfer underway, the WLA believes this is a significant problem for our society as well. Today's clients want and deserve a more diverse selection of financial advisors.

“There are many theories about the lack of progress in gender representation in the advising profession, but there does not appear to be an industry-wide strategy to address it, “ said Stephanie Gularte, Executive Director for the Women’s Leadership Alliance. “While we may not have the answers to solve this inequity overnight, at the WLA, we believe that the path to progress is to move beyond siloed efforts and to organize a collaborative movement among leaders from different corners of the industry.”

To that end, the WLA is announcing a newly formed advisory board to provide an industry-wide, firm-agnostic collaboration to advance the organization’s mission.

"Since our founding in 2017, it has always been the vision of the Women's Leadership Alliance to address the lack of gender representation throughout the wealth management industry,” said WLA Founding Board President, Kalita Blessing. “Our new advisory board is a significant step forward in building collaborations among a diversity of stakeholders to identify strategies and actions to address this underrepresentation."

Tricia Kasner, who recently retired as Barron’s long-time Managing Director of Events and Conferences, will guide the advisory board as its chair.

“As a partner to the WLA, I see a unique opportunity to work in building an advisory board of finance professionals from a diverse cross-section within our industry to further advance the initiatives planted when the WLA was founded in order to move the needle in the representation of women in wealth management,” said Kasner.

Blessing, Gularte, and Current Board President, Kimberlee Bouska, will work closely with the advisory board to identify strategies and industry collaboration opportunities to improve methods for attracting and retaining women in financial advising, as well as advocating for advancing more women into roles of leadership within the industry.

“Innovative thinking and collaborative thought-leadership are vital to real change,” said Gularte. “At the WLA we are committed to bringing diverse perspectives together with a shared vision of meaningful progress in gender representation at all levels in the financial advising profession.”

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The founding WLA Advisory Board include women from around the country and within a range of firms and companies:

Maria Daley, CFP®

RIA Consultant/ C-Suite Executive
Tampa, FL

Roslyn Dawson Thompson

President & CEO
DAWSON Communications + Strategy + Governance
Dallas, Texas

Tricia Kasner, Chair

Retired, Barron's, Managing Director, Marketing and Conferences
Brooklyn, NY

Kathleen Malone

Private Wealth Advisor
Managing Director-Investments
Wells Fargo Advisors
Charlotte, NC

Geri Eisenman Pell, CFP®, MBA, CDFIA®

Private Wealth Advisor | Chief Executive Officer
Pell Wealth Partners
A private wealth advisory practice of Ameriprise Financial Services, LLC
Rye Brook, NY

Jodi Perry

National Head of Advisor Recruiting
Raymond James Financial, Inc.
Saint Petersburg, FL

Teri Twarkins Kelley, CFP®, CRPS®, CIMA®

Executive Director, Financial Advisor
Family Wealth Director
Viewpoint Wealth Management Group at Morgan Stanley
Scottsdale, AZ 85254

Elizabeth Weikes

Managing Director and Wealth Partner
J.P. Morgan Wealth Management
New York, NY 1



Women's Leadership Alliance

Advisory Board 2024



Tricia Rentz Kasner
Retired, Managing Director, Barron's
Board Chair



Kalita Blessing, CFP®, CAP®, AEP®, CSRIC™
Senior Wealth Advisor
Mercer Advisors



Kimberlee Bouska, CFP® CRPC®
Investment Management Consultant, Financial Advisor
Addison Avenue Investment Services



Maria Daley, CFP®
RIA Consultant/C-Suite Executive



Ros Dawson Thompson
President & CEO
DAWSON Communications+Strategy+Governance



Teri Kelley, CFP®, CRPS®, CIMA®
Executive Director, Financial Advisor
Morgan Stanley Wealth Management



Kathleen Malone
Private Wealth Advisor
Managing Director-Investments
Wells Fargo Advisors



Geri Pell, CFP®, MBA, CDFP®
Private Wealth Advisor, Chief Executive Officer
Pell Wealth Partners
A private wealth advisory practice of
Ameriprise Financial Services, LLC



Jodi Perry
National Head of Advisor Recruiting
Raymond James Financial, Inc.



Elizabeth Weikes
Managing Director and Wealth Partner
J.P. Morgan Wealth Management



History of the Women's Leadership Alliance

The Women's Leadership Alliance (WLA) is a 501(c)(3) nonprofit organization was founded in 2017 by a group of leading female financial planning professionals from around the country. The alliance seeks to attract more women into the financial planning industry and to provide impactful resources and empowering support to women financial planning professionals. We are dedicated to changing the conversation regarding women and the field of financial advisory services, and strive to significantly increase the ranks of women within this dynamic and meaningful profession.

Vision

A transformed financial advising industry in which women comprise an equitable representation at every level.

Mission

To attract, develop, and empower women to build thriving and fulfilling financial advising careers.

Purpose of the WLA Advisory Board

To organize and activate a firm-agnostic body of financial advising industry professionals to identify solutions and advocate for industry-wide actions to attract, empower, and advance women in the financial advising profession.